



CASE: Jonathan Shockley

Case Management Plan

Target Med-Legal Specialty(ies):

MPA

3rd Party Referrals Needed: ☐ Employment/132(a) ☐ S&W ☐ P.I. ☐ Other: _____

Case Status

Is the client receiving any of these benefits?

TD: _____ PD: _____ SDI: _____

unknown

Special Considerations/Issues Likely to Arise:

132(a), File: Yes ☐ No ☐ More info needed/set task: ☐

S&W, File: Yes ☐ No ☐ More info needed/set task: ☐

Adtl. Documents Needed from Client/SDT:

**Gemini automatically subpoenas all Drs./facilities listed in intake*

MPN PTP?: ☒ Yes ☐ No → if yes, is Intake finding a new MPN PTP? ☐ Yes ☒ No

How to use this sheet: Attorneys to review intake and fill this sheet in, this is to be reviewed at a weekly team meeting. This sheet then becomes the CMs responsibility. CM is to scan this into Merus as "Case Plan" and tasks are to be set by CM.